Prioritization plus™

AUTHOR/APPROVER GUIDE

Abstract

The Author Approver Guide is intended for all participants in the Prioritization Process. It is particularly useful for Authors and Approvers who collectively make up the Author Team.

Version 3.0

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This Document

This *Author/Approver Guide* is for all participants in the Program Prioritization Process. It is particularly useful for *Authors*, *Approvers*, and members of the *Task Force*(s).

A separate *Setup Guide* is designed for the first *Users* of the Prioritization Plus™ system who will be getting the software ready for the *Data Collection* Phase. The *Setup Guide* will support the *Institution Administrators* and *Institution Support* users.

Process Calendar

At a very high level, Program Prioritization occurs in six phases.

Setup Phase

During the *Setup Ph*ase, your *Steering Committee* (or Project leadership by some other name) makes numerous decisions about your prioritization project. The most important decisions include writing the criteria by which your programs will be prioritized and the questions that will get to the essence of each criterion. This phase is the subject of the separate *Setup Guide.*

Training Phase

Allows access to the system but no ability to "save" work.

Data Collection Phase

During the *Data Collection Phase Authors* and *Approvers* work in the system to answer questions and provide information that is intended to focus on the essence of the various *Prioritization Criteria*. When complete, the *Approver* assigned for each program electronically approves the write-up indicating that it fairly and accurately represents the program.

> Note: Once approved, programs become available to the task force to begin their review.

Review Phase

During the *Review Phase* the *Task Force* reviews the program write-ups and may write comments. They will also assign scores to individual *Criterion Question* responses or at the *Criterion* level.

> **Choices:** Your institution has made a number of choices about how the system will work. One of those choices is the option to assign scores to either *Prioritization Criteria* or to *Criterion Question*, but not both. The Criteria have been assigned weights representing your institution's values and scores are rolled up to produce a raw program score. Your institution may also have chosen not to do numeric scoring at all.

Analysis Phase

During the *Analysis Phase* all information is locked with the exception of tier assignments. The system assigns programs to tiers (quintiles or the grouping designed by your institution) based on scores. Your setup may optionally allow the task force to use judgment to make fine adjustments to the tier assignments when appropriate.

Those individuals assigned to writing the final report (typically the *Task Force*) do their analysis of the findings and write the report and any recommendations. This is not an automated process. The system facilitates the collection and management of your input – but the resulting decisions are not made by software.

Closed

No further updates are allowed.

Roles and Assignments

You are probably reading this manual because you have one or more of the following roles or assignments. You can have only one Role, but multiple Assignments.

Roles

User

Most participants will be assigned a User role. As a user you can have multiple *Author* and *Approver* assignments. You will generally have visibility limited to your own assigned work unless your institution has decided to make completed work more broadly visible.

Support Team (Institution Administrator Role and Institution Support Role)

The *Support Team* members will have either the Institution Administrator or Institution Support role. This team will have prepared the system for your use and will be your primary source of training and assistance with system related issues. The *Support Team* is the only group of people, other than the assigned *Author*s and *Approver*s, who can see your work while it is in draft. This is for the purpose of providing assistance as needed.

Task Force

To be eligible to be assigned to a *Task Force*, a person must be assigned a *Task Force* role.

Assignments

Any person regardless of role may have multiple Assignments.

Author

Authors are assigned for one or more specific *Programs*. They are responsible to respond to *Criterion Questions* that constitute the Program Write-up. A person may be assigned as an *Author* for multiple *Program*s and a program may have multiple *Authors*. All of the *Authors* assigned to a program plus the program *Approver* are referred to in this document as the *Author Team*.

Approver

*Approver*s are also *Author*s and may participate fully with the writing team. In addition, *Approver*s will review the entire program write-up and approve the final work. This action indicates that the write-up is complete and makes it available to the *Task Force* for the review and scoring process. There is one approver per program.

Task Force

The *Task Force* is the group of people who will be responsible for reviewing all write-ups and scoring according to your institution's rubrics. To be eligible to be on a task force a person must have a *Role* of *Task Force*, *Institutional Support*, or *Institutional Administrator*.

Steering Committee

Your Steering Committee may have a different name at your institution. It is the leadership team that makes the policy decisions about the prioritization process as well as schedule and process decisions. Steering Committee is not an assignment in the software.

Responding to the Questions (*Author*s or Approvers)

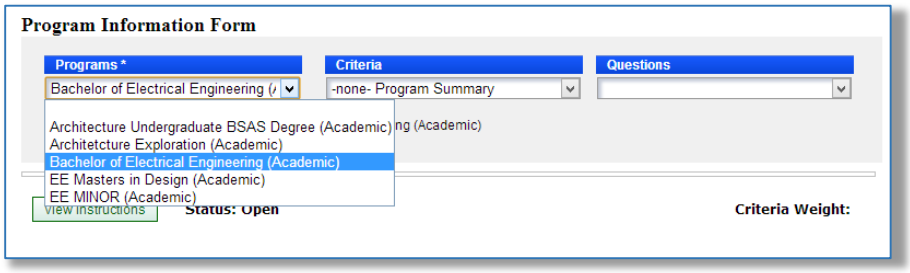
You can reach the *Edit Program Information* form from the *Program Information* Menu. This form is used by *Authors* and *Approvers* during the *Data Collection Phase*.

> **Note:** The *Data Collection Phase* ends for a program when the program write-up is approved by the assigned *Approver* and the entry is locked and cannot be changed after that point.

The *Edit Program Information Form*

From the Program Information Menu you can open the *Edit Program Information* Form.

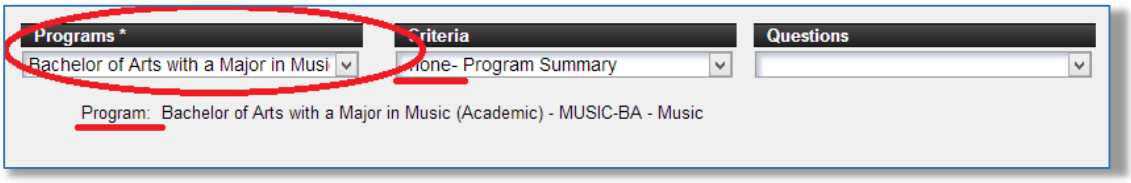
The three drop downs on the top of the page are your means of navigating around the components of a Program Write-Up. The first, the *Program* Drop Down, will reveal the list of programs for which you are assigned as an *Author*.



Navigate Like an Outline

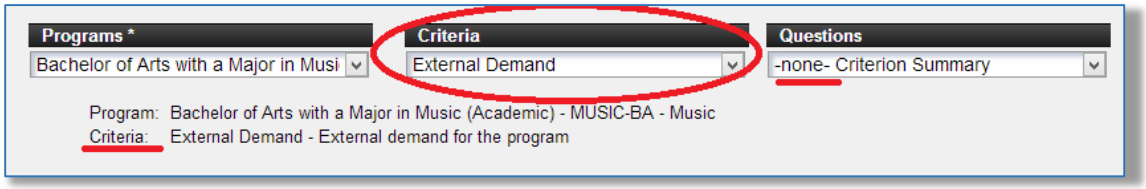
Once you have selected a *Program* to work on, you can navigate through the list of *Criteria* and associated *Criterion Questions*. You can enter write-up text at each "outline" level (*Program*, *Criteria*, and *Criterion Question*). It may be useful to answer the *Criterion Questions* first and then summarize upward to *Criteria* and *Program*.

Think as though the three drop down boxes represent an outline.

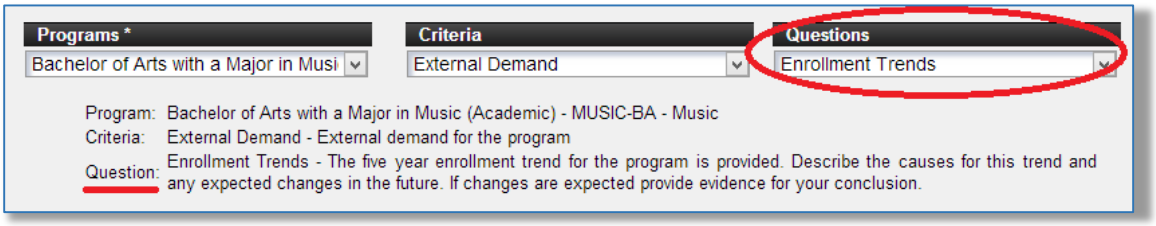

Programs *
Criteria
Questions
Bachelor of Arts with a Major in Musi
none- Program Summary
Program: Bachelor of Arts with a Major in Music (Academic) - MUSIC-BA - Music

Program /"- none- Program Summary" selected in the Criteria drop down

This will be your *Program* summary text. This section is most likely written last and summarizes your program based on all the detail provided.

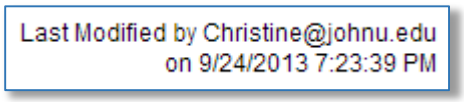

Programs *
Criteria
Questions
Bachelor of Arts with a Major in Musi
External Demand
-none- Criterion Summary
Program: Bachelor of Arts with a Major in Music (Academic) - MUSIC-BA - Music
Criteria: External Demand - External demand for the program

Program/Criterion/"none-Criterion Summary" selected in the Question drop down
This will be your *Criteria* summary text. This section is most likely written after all *Criterion Questions* have been answered and summarizes the responses to the *Criterion Questions*.


Programs *
Bachelor of Arts with a Major in Musi
Criteria
External Demand
Questions
Enrollment Trends
Program: Bachelor of Arts with a Major in Music (Academic) - MUSIC-BA - Music
Criteria: External Demand - External demand for the program
Question: Enrollment Trends - The five year enrollment trend for the program is provided. Describe the causes for this trend and any expected changes in the future. If changes are expected provide evidence for your conclusion.

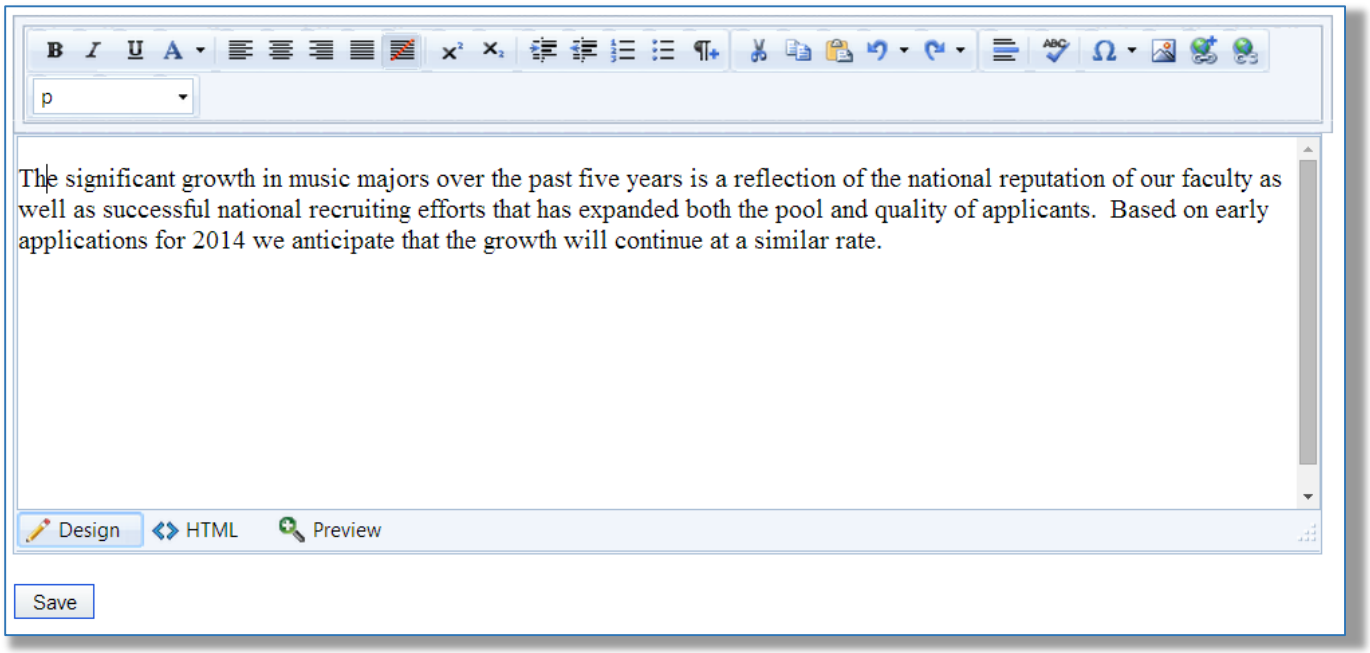
Program/Criterion/Question
These are the individual *Criterion Question* that have been designed by your institution to allow you to provide insight on how well the program meets the associated Criterion.

Since you may be working as an *Author Team* with others the form displays who made the last change. Time is indicated in GMT.



Working with the Edit Box

The Edit Box allows entry to text as well as a limited amount of formatting.


p
The significant growth in music majors over the past five years is a reflection of the national reputation of our faculty as well as successful national recruiting efforts that has expanded both the pool and quality of applicants. Based on early applications for 2014 we anticipate that the growth will continue at a similar rate.
Design
HTML
Preview
Save

The controls on the top of the box provide a set of formatting options.

Editing Tips

- **Keep it simple.** While formatting options are available, your institution is likely to want to combine these write-ups into summary documents. Excessive formatting will detract from your message.
- **[Save] your work.** If you leave the page without saving your work it will be lost. Better to save more often. **Nothing goes into the database until you press the [Save] button!**

- Inserting links to external documents or including images may or may not be allowed by your institution. If allowed, follow guidance provided by your institution.
- Word count limits will be set by your institution. Write succinctly to make your points.

With some limitations you can "Cut and Paste" from *MS-Word* or other Source

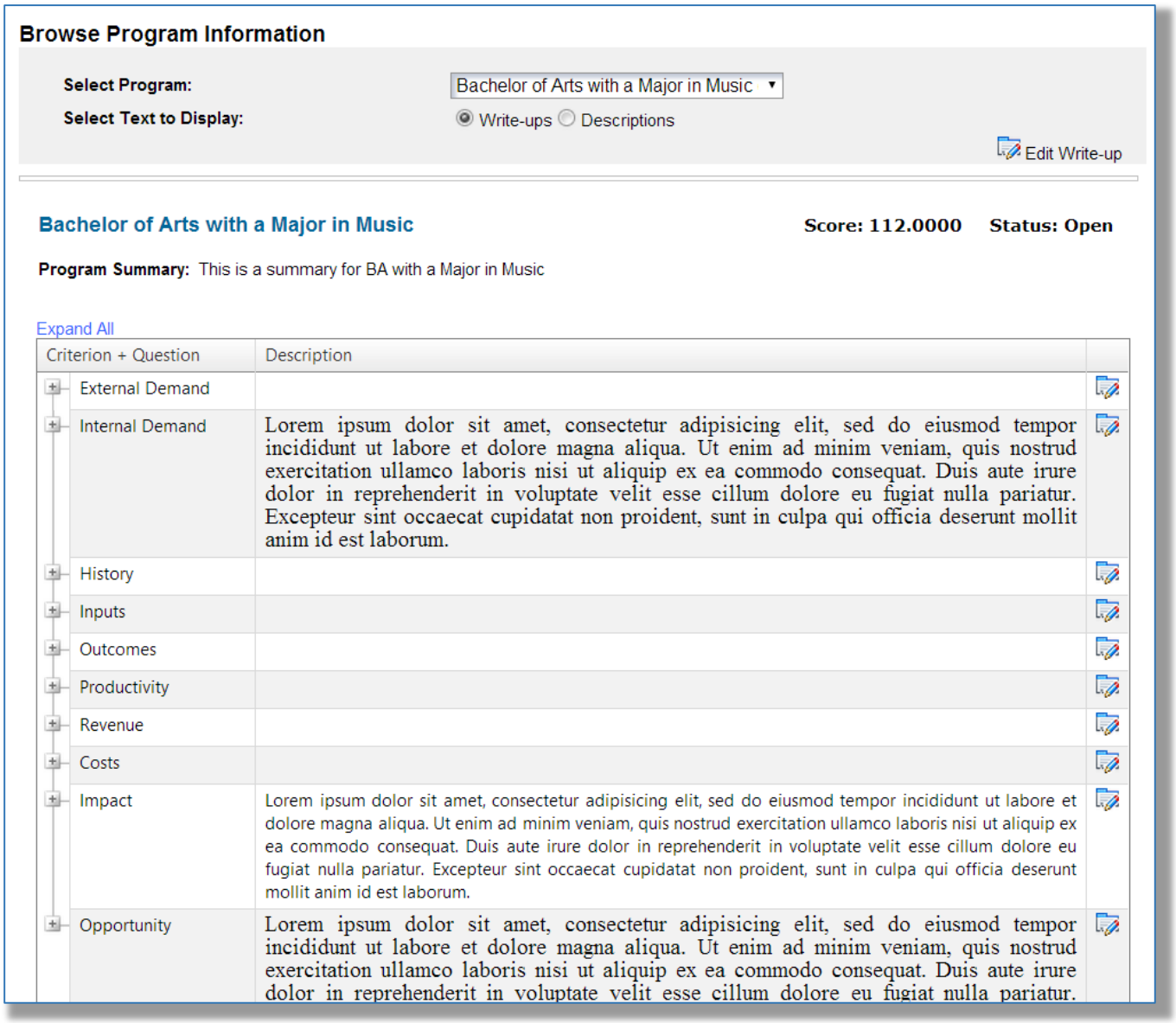
Many people will choose to work outside of the system and then paste the results into the *Program Information Form* editor box. You can paste text from other sources, especially Microsoft WORD, but be aware of some limitations.

- Prioritization Plus™ limits the formatting allowed in order to give a consistent look and readability across all of the write-ups.
    - Font changes are not allowed in order to maintain a consistent look.
    - Tables are not allowed because you can enter table data separately in a way that allows the institution to download tables as data.
    - Images can't be "pasted" into a document although they can be added from within the editor if your institution allows images.
    - Numerous HTML formats (such as Forms and iFrame) are not allowed because they could create a security problem or because the reporting tools do not support them.
- Prioritization Plus™ does support:
    - Bold, Italic, Underline.
    - Bullet Lists or Numbered Lists (from MS-Word).
    - Heading 1, Heading 2 and Heading 3 styles (from MS-Word).
- Prioritization Plus™ will attempt to remove formatting that is not supported.
    - Most Microsoft WORD text will be "cleaned up" at the moment you paste it.
    - Review as you paste to be sure you are getting what you expected and make any necessary modifications within the Prioritization Plus™ editor.
    - Some removal of unsupported formatting will happen when you save your work. **If you have pasted text it is a good idea to look over your text after you save in case you need to make any manual changes.**
- Text pasted from sources other than Microsoft Word may be less reliable.
    - Paste from MS-Excel is not supported. (Tables are not supported in the text).
    - Text pasted from other sources may not be checked as completely. Be sure you are only pasting supported formatting and double check the formatting after you save.

Browse Program Information

One challenge of the *Edit Program Information* form is that you see the write-up one component at a time. It is a little harder to view and review the entire write-up. The *Browse Program Information* form is designed to solve that problem.

It displays the entire write-up in an expandable outline view. The initial display shows the Program Summary text as well as each criterion summary.


Browse Program Information
Select Program:
Bachelor of Arts with a Major in Music
Select Text to Display:
Write-ups
Descriptions
Edit Write-up
Bachelor of Arts with a Major in Music
Score: 112.0000
Status: Open
Program Summary: This is a summary for BA with a Major in Music
Expand All
Criterion + Question
Description
External Demand
Internal Demand
Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
History
Inputs
Outcomes
Productivity
Revenue
Costs
Impact
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Opportunity
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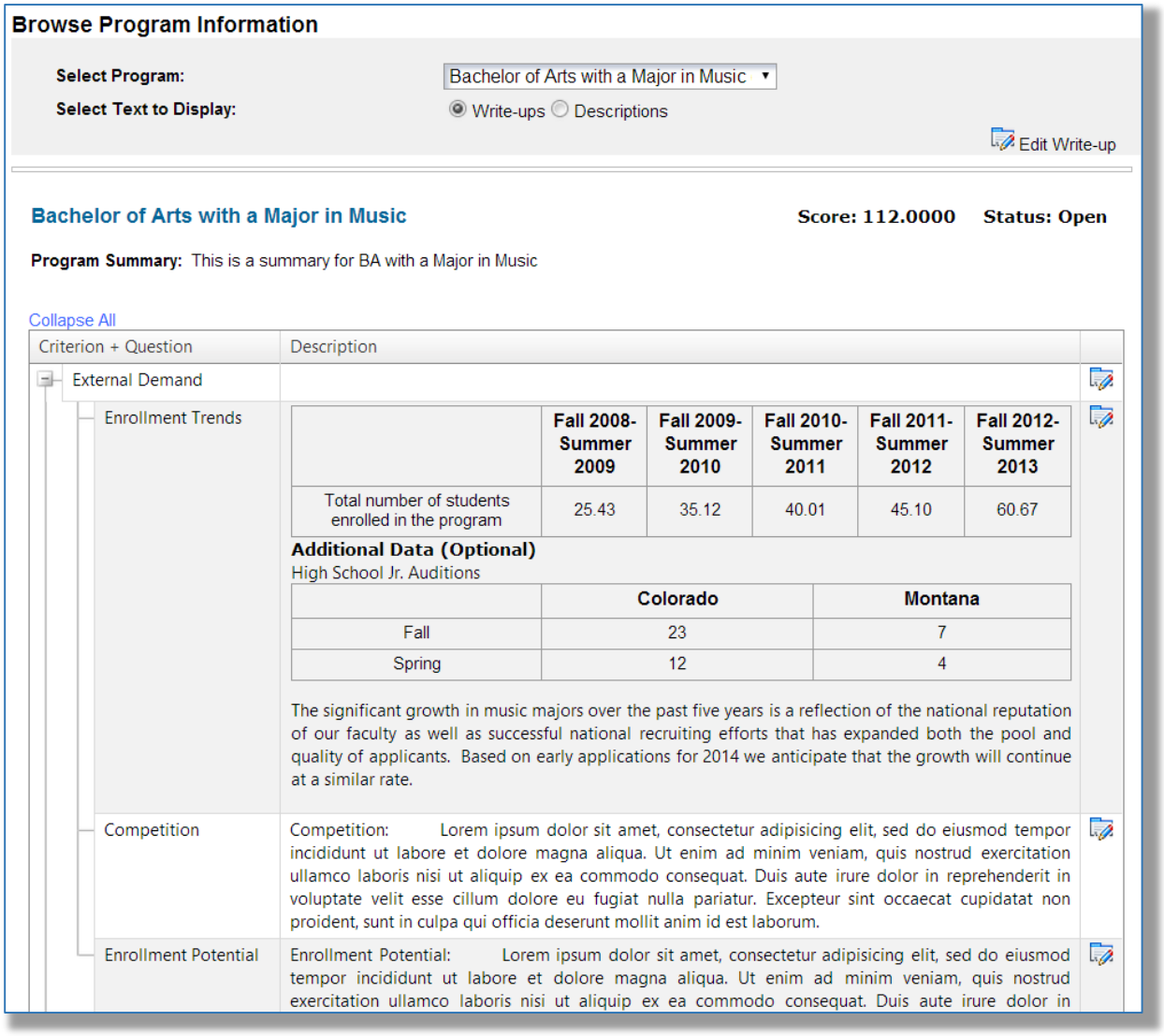
By clicking on any + sign by the criterion or by selecting “Expand All” you can see the complete write-up including all question responses.



Browse Program Information

Select Program: Bachelor of Arts with a Major in Music

Select Text to Display: Write-ups Descriptions

Edit Write-up

Bachelor of Arts with a Major in Music **Score: 112.0000** **Status: Open**

Program Summary: This is a summary for BA with a Major in Music

Collapse All

Criterion + Question	Description
External Demand	
Enrollment Trends	

	Fall 2008-Summer 2009	Fall 2009-Summer 2010	Fall 2010-Summer 2011	Fall 2011-Summer 2012	Fall 2012-Summer 2013
Total number of students enrolled in the program	25.43	35.12	40.01	45.10	60.67

Additional Data (Optional)

High School Jr. Auditions

	Colorado	Montana
Fall	23	7
Spring	12	4

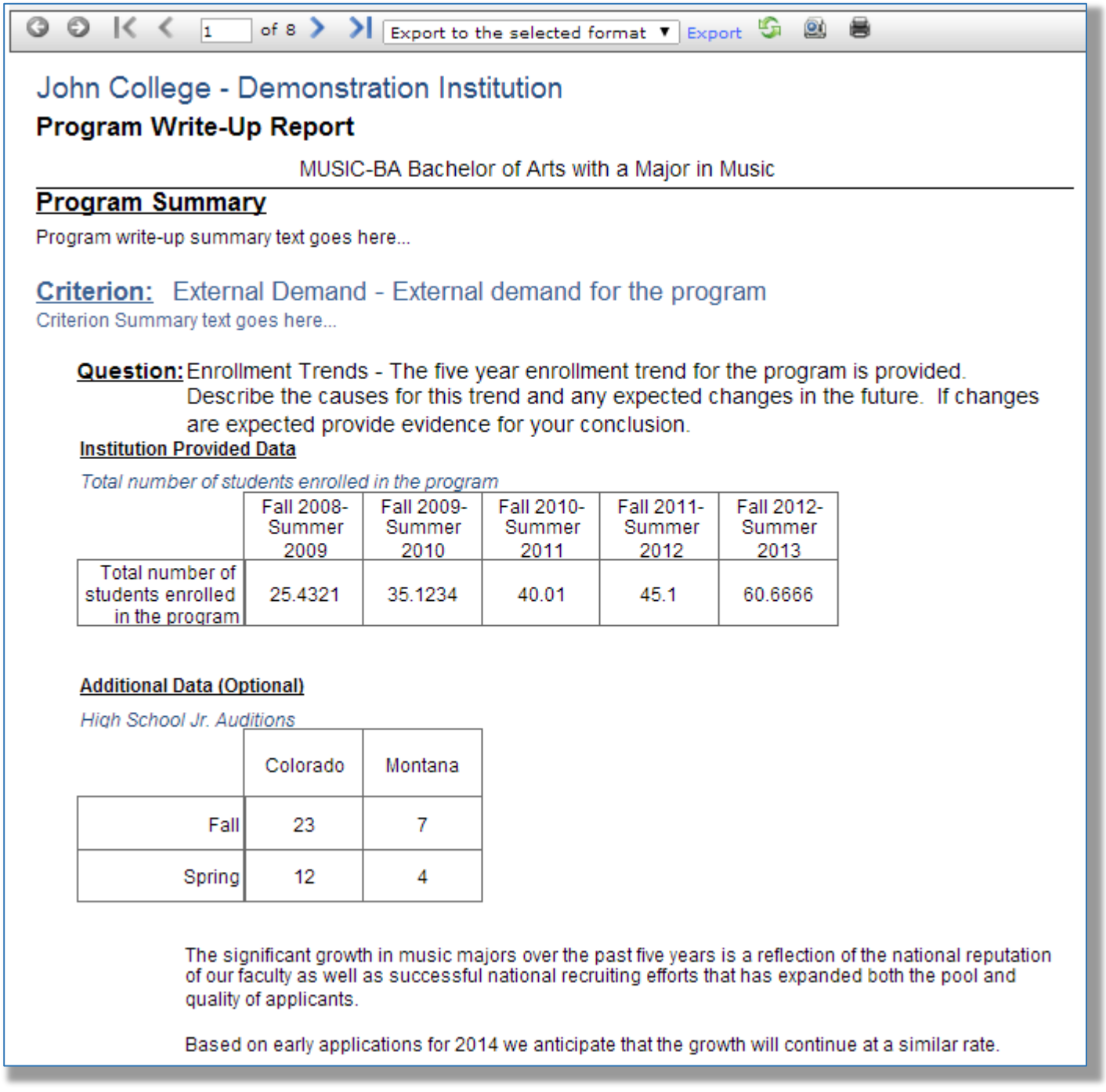
The significant growth in music majors over the past five years is a reflection of the national reputation of our faculty as well as successful national recruiting efforts that has expanded both the pool and quality of applicants. Based on early applications for 2014 we anticipate that the growth will continue at a similar rate.

Competition	Competition: Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
Enrollment Potential	Enrollment Potential: Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in

Clicking on an Edit Icon on the right will take you directly to the *Edit Program Information* form for that specific element. This is especially useful for final editing of the write-up.

Program Write-up Report

From the *Report* menu, *Authors* and *Approvers* can run the Program Write-Up report on their assigned program. Prior to approval, they will be labeled "Draft".



1 of 8 Export to the selected format Export

John College - Demonstration Institution

Program Write-Up Report

MUSIC-BA Bachelor of Arts with a Major in Music

Program Summary

Program write-up summary text goes here...

Criterion: External Demand - External demand for the program

Criterion Summary text goes here...

Question: Enrollment Trends - The five year enrollment trend for the program is provided. Describe the causes for this trend and any expected changes in the future. If changes are expected provide evidence for your conclusion.

Institution Provided Data

Total number of students enrolled in the program

	Fall 2008-Summer 2009	Fall 2009-Summer 2010	Fall 2010-Summer 2011	Fall 2011-Summer 2012	Fall 2012-Summer 2013
Total number of students enrolled in the program	25.4321	35.1234	40.01	45.1	60.6666

Additional Data (Optional)

High School Jr. Auditions

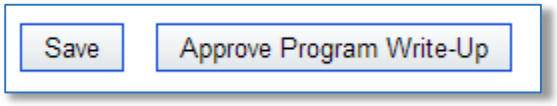
	Colorado	Montana
Fall	23	7
Spring	12	4

The significant growth in music majors over the past five years is a reflection of the national reputation of our faculty as well as successful national recruiting efforts that has expanded both the pool and quality of applicants.

Based on early applications for 2014 we anticipate that the growth will continue at a similar rate.

Approving the Program Write-up (*Approver*)

As an *Approver* you are also a member of the *Author Team* but you have the additional responsibility of determining when the writing is done. You do this by approving the program write-up.



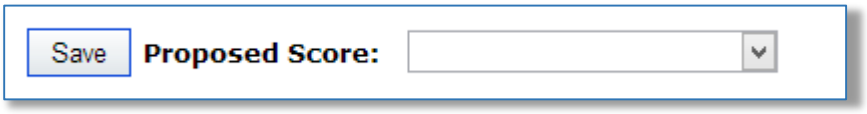
Approval is (almost) Final

It is best to have reviewed the entire write-up content before approving a write-up. It can be undone, but you cannot do it yourself. To retract an approval a *Task Force* member must agree to remove your approval so you can continue to revise text. In that case, you must approve the program write-up again when you are complete.

> **Note:** Your Steering Committee may set deadlines and is able to approve your write-up for you when deadlines have passed if the *Approver* has not done so. Please be aware of your institution's project schedule and policies.

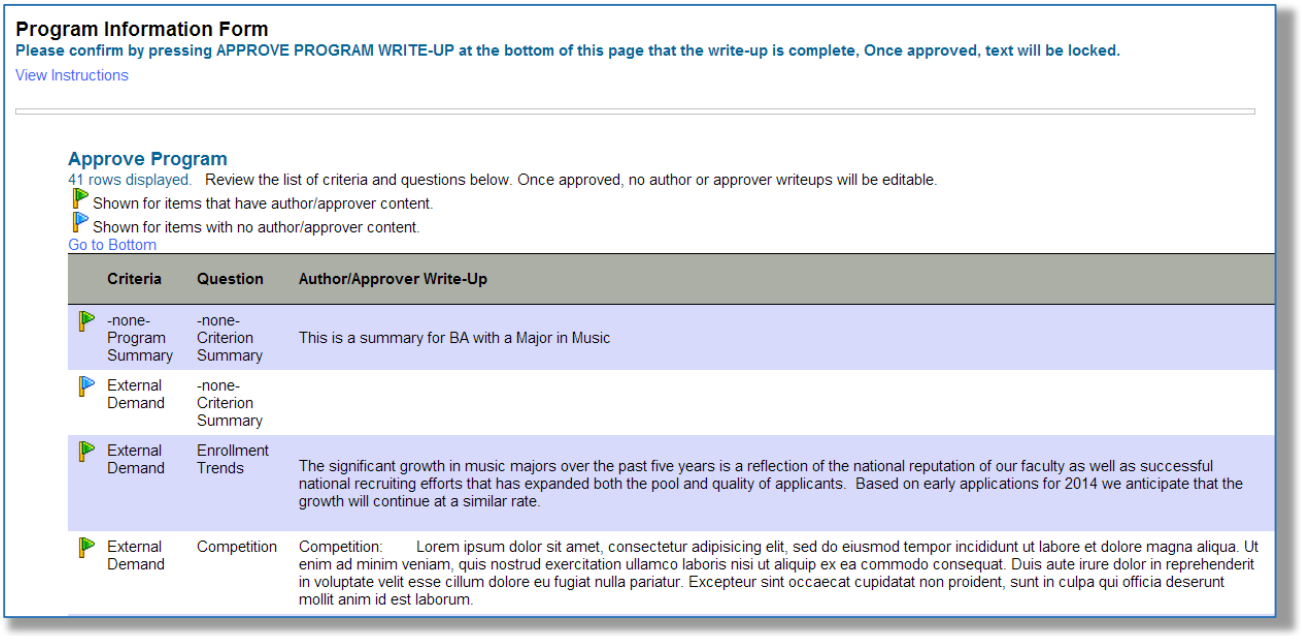
Approve the Program Write-up

Approval is at the program level which means you are approving the entire write-up including *Program* summary, all *Criteria* summaries, and all *Criterion Question* responses.

> **Note:** If your institution has chosen to enable "Proposed Scores" as an *Approver* you can suggest scores. Your proposed scores (at either question or criterion level) will be used as input advice to the Task Force but will not be included in the final scoring. It will, however, enable you to highlight differences between programs for which you are responsible. The scoring control will be at either the Criteria level or the Question level depending on your institution's setup options. The Proposed Score drop-down will be next to the [*Save*] button at the appropriate level. Select the appropriate score and then [*Save*]
>
> 
>

To approve the write-up, navigate to the program summary level by setting the *Criteria* drop down to "none – Program Summary" and select the [*Approve Program Write-Up*] button.

You will be presented with a confirmation form that will list every component of the program write-up. You can proceed to [*Approve Program Write-Up*] at the bottom of the form or [*Cancel*] at this point.



Program Information Form

Please confirm by pressing APPROVE PROGRAM WRITE-UP at the bottom of this page that the write-up is complete, Once approved, text will be locked.

View Instructions

Approve Program

41 rows displayed. Review the list of criteria and questions below. Once approved, no author or approver writeups will be editable.

Shown for items that have author/approver content.

Shown for items with no author/approver content.

Go to Bottom

Criteria	Question	Author/Approver Write-Up
-none- Program Summary	-none- Criterion Summary	This is a summary for BA with a Major in Music
External Demand	-none- Criterion Summary	
External Demand	Enrollment Trends	The significant growth in music majors over the past five years is a reflection of the national reputation of our faculty as well as successful national recruiting efforts that has expanded both the pool and quality of applicants. Based on early applications for 2014 we anticipate that the growth will continue at a similar rate.
External Demand	Competition	Competition: Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Note: An *Approver* can use this form to check the status of the write-up work at any time. Just be sure not to confirm by pressing [*Approve Program Write-Up*] until you are ready.

Glossary

Approver	An *Approver* has final approval for a program write-up and marks the write-up as complete. The approver also has *Author* access and can participate actively on the team with the authors for the program.
Author	A *User* who is assigned the responsibility for preparing the program write-ups for one or more programs. Any *User* can be assigned to an author role. If multiple authors are assigned to the same program they should be prepared to work together on the write-up because only one write-up will represent the *Author Team*.
Criteria	The standards or benchmarks by which programs will be evaluated and prioritized. Information related to a *Criterion* is gathered through the answers to one or more *Criterion Question*s that are designed to highlight performance against the *Criterion*.
Criterion Question	The Criteria Questions are the specific requests for information related to a criterion that will guide the authors. Well-chosen and written questions will improve the quality of responses and shed the light you need on how well a program meets the specified criterion. Default questions are provided for the default Criteria but it is not intended or recommended that you use all of these. A small number of carefully chosen questions will be most successful.
"Department"	A "department" is the organizational unit to which programs are assigned. In the *User* manual "department" is in quotes because its actual label in the system can be modified to meet your needs on the *Labels* form.
Institution Administrator	The *Institution Administrator* is a *User* with the highest level of system privilege for the institution. The Institution Administrator can do any of the functions of Institution Support plus the following: - Change the Process Calendar Phase - Edit Criteria, Questions or Scoring options after the *Data Collection Phase* has begun. Of course, making any of these changes after the *Data Collection Phase* has begun is not recommended.
Institution Support	Institution Support *User*s have most system privileges necessary to setup and operate Prioritization Plus™ including the ability to add *Users*, grant privileges, and perform most activities during the *Setup Phase*.
Prioritization Criteria	The set of *Criteria* by which programs are prioritized is central to how your institutional values and strategy are reflected. The set of criteria recommended in *Prioritizing Academic Programs* is provided and can be loaded by default. Although the default weights are set to be equal, you will want to be thoughtful about your final selection and wording of *Criteria* as well as the relative weighting given to each *Criterion*.
Program Type	Where it makes sense for different groups of programs to be prioritized using different sets or *Criteria* and optionally, by different task forces, a separate *Program Type* is used. Most institutions use only two types of *Program*s, "Academic" and "Non-Academic" each with their own set of criteria.

Program	Most simply stated, a program is any activity undertaken by your institution that consumes resources. It is the unit of analysis of the prioritization project.
"School"	A "*School*" is the higher organizational unit to which "departments" are assigned. In the Prioritization Plus™ documents, "school" is in quotes because it is a label in the system that can be modified to meet your needs on the Institution Setup | Labels form.
Steering Committee	The group of individuals assigned to design and oversee the entire program prioritization process. They will make most of the setup decisions and have a high level of responsibility for the success of the project.
Task Force	A team of representative and strategic thinking individuals who will be responsible for reviewing all the program write-ups, providing useful comments and assigning a score to criteria or questions depending on the scoring options.
User	The term *user* has two meanings depending on context. Most generally it refers to any person with access to Prioritization Plus™ by means of a *Username* and password. However, when distinguishing *Users* by role, a *User* is any person who is not in an *Institution Administrator*, *Institution Support* or *Task Force* role. *Users* may be assigned *Author*, *Approver*, or *Task Force* responsibilities.
User Role	The *User* may have one of four roles assigned. Most *Users* have a role of "*User*." Users will receive additional privileges and access dependent on their assignments as *Author*, *Approver*, or *Task Force* member. A few *Users* will be assigned the role of *Institution Support*, *Institution Administrator*, or *Task Force.*